



***National Practitioner Data Bank (NPDB) –  
Healthcare Integrity and Protection Data Bank (HIPDB)  
IQRS USERS GROUP***

NPDB-HIPDB

Customer Service Center

Customer Relationship Management "CRM" System

Overview & Demonstration

October 17, 2002





# *Agenda*

- Objectives
- System Overview and Benefits
- System Functionality
- Demonstration





## *Objectives*

- Improve customer service and support.
- Capture detailed information regarding all customer interactions.
- Provide consistent and appropriate responses.
- Improve management and quality assurance capabilities.



## *System Overview and Benefits*

- PC-based integration of phone calls, e-mail, voice mail, and letter correspondence.
  - A CRM integrates telephone, e-mail, and correspondence processing through a single system. Regardless of the media customer uses, the same trained staff are able to respond quickly and consistently with high quality.
- Single interface to process and record all customer interactions.
  - Interactions are logged by customer and a record is retained. Through automated screen pops, Information Specialists know the customer and the issues or problems they have experienced, and they can effectively provide help without requesting history.



## *System Overview and Benefits*



- Extensive set of management and quality assurance tools and reports.
  - Supports immediate elevation of calls to higher levels of management, as required.
  - Offers enhanced monitoring and recording capability for quality assurance and training refinement.
  - The system supports trend analysis (e.g., most frequent subjects) which provides improved understanding of user needs, allowing for development of targeted materials to help reduce or prevent problems for other users.



## *System Functionality*

- A new support incident is created for each support call, e-mail, and letter correspondence.
- In the case of a telephone call, the interactive attendant recognizes registered entities by last five digits of DBID and automatically creates new support incident record.
- A screen "pop" alerts the information specialist to information about the caller and call history. The information specialist then records and stores detailed information on each customer interaction.
- The system then tracks multiple support steps required to complete support incident (e.g., assignment to someone for action).
- Incident remains open until it is completed and closed.





# Interaction Client Status



Picture Icon  
Indicate  
Status

**Interaction Client (WheelerP) IC Server Name bell**

Interactions Queues Users Stations Lines Workgroups Reports Configuration Help

Number:  Account Code:  Make Call Conference

My Interactions

Queue	Name	Number	Duration	State	User	Station

Pickup Disconnect Hold Transfer Voice Mail Listen Record Pause Mute Private Assistant

My Status: Available, No ACD

CustomerSupport Overflow Email After Hours

Last Name	First Name	Phone Number	Status	Time in Status	Logged In
Afriye-Opo...	Datrice	305	Available	0:11:31	✓ Yes
Williams	Julian	727	Available	0:03:44	✓ Yes
Holden	Heather	310	Available	0:09:46	✓ Yes
Wilgus	Jeanne	304	Available	0:07:04	✓ Yes
Spinner	Debra	306	Available	0:03:27	✓ Yes
Wheeler	Peggy	301	Available, No ACD	0:13:44	✓ Yes
Cox	Lucinda	316	Available, No ACD	0:09:57	✓ Yes
Gebreab	Solomon	311	Available, No ACD	0:08:13	✓ Yes
Heck	Joann	111	Do Not Disturb	67d 20:51:21	✓ Yes
Bohan	Lisa	317	Gone Home	78d 01:48:11	✗ No
Geraci	Terry	333	Gone Home	78d 01:48:11	✗ No
Ohler	Jennifer	309	Gone Home	74d 01:12:09	✗ No
ICAdmin		300	Gone Home	69d 00:22:59	✗ No

Total Calls 1 Total Time on Calls 00:13:45 Longest Call 00:13:45 Avg Time on calls 00:13:45



# Current Call Summary

**Interaction Client (WheelerP) IC Server Name bell**

Interactions Queues Users Stations Lines Workgroups Reports Configuration Help

Queue Summary 'CustomerSupport'

Overflow  
Email  
Customer  
After Hou

Calls waiting 0 Longest call waiting N/A Agents logged in 8  
 Calls Answered 3 Longest talk time 0:01:01 Agents available 0

Calls received (current period) 10 Calls received (previous period) 17  
 Calls answered (current period) 11 Calls answered (previous period) 15  
 Calls completed (current period) 9 Calls completed (previous period) 18  
 Calls abandoned (current period) 0 Calls abandoned (previous period) 1  
 Average wait time (current period) 0:00:11 Average wait time (previous period) 0:00:44  
 Average talk time (current period) 0:02:52 Average talk time (previous period) 0:02:37

Calls received (current shift) 170 Calls received (previous shift) 0

Queue	Name	Number	Duration	State	User	Station	Line	Call ID
Custo...	From: Practitioner	(210) 704-4146	0:01:38	Connected	holdenh	208375s	T1-Line-19	800000312
Custo...	From: Anonymo...	(301) 770-6806	0:01:46	Connected	Afriye-OpokuD	206798s	T1-Line-06	800000311
Custo...	From: RegEntity	(847) 698-6227	0:02:06	On Hold	williamsj	209481s	T1-Line-13	800000310

Pickup Disconnect Hold Transfer Voice Mail Listen Record Pause Mute Private Assistance

Total Calls 11 Total Time on Calls 00:50:44 Longest Call 00:21:01 Avg Time on calls 00:04:36







# Interaction E-mail Status



Interaction Client (WheelerP) IC Server Name bell

Interactions | Queues | Users | Stations | Lines | Workgroups | Reports | Configuration | Help

Queue

- Overflow
- Email
- Customer
- After Hou

### Summary 'Email'

Calls waiting	0	Longest call waiting	N/A	Agents logged in	0
Calls Answered	2	Longest talk time	1:14:06	Agents available	0
Calls received (current period)	1	Calls received (previous period)	0		
Calls answered (current period)	0	Calls answered (previous period)	0		
Calls completed (current period)	0	Calls completed (previous period)	0		
Calls abandoned (current period)	0	Calls abandoned (previous period)	0		
Average wait time (current period)	N/A	Average wait time (previous period)	N/A		
Average talk time (current period)	N/A	Average talk time (previous period)	N/A		
Calls received (current shift)	18	Average wait time (current shift)	N/A	Calls completed (previous shift)	0

Queue	Name	Number	Duration	State	User	St...	Line	Call ID
Email	Naigle, Bonnie	SMTP:bonnie.naigle@vicare.c...	2:15:57	ACD - Wait Agent	Email		OhlerJ	1200000406
Email	RSHartzMD@a...	SMTP:RSHartzMD@aol.com	5:11:37	ACD - Wait Agent	Email		OhlerJ	1200000204

Pickup | Disconnect | Hold | Transfer | Voice Mail | Listen | Record | Pause | Mute | Private | Assistance

Total Calls 18 | Total Time on Calls 02:08:41 | Longest Call 00:40:14 | Avg Time on calls 00:07:08





# T-1 Line Status



Interaction Client [WheelerP] IC Server Name bell

Line	Queue	Name	Number	Duration	State	User	Station
Analog-01							
Analog-02							
T1-Line-01							
T1-Line-02	CustomerSupport	From: Practitioner	(937) 399-8014	0:04:47	Connected	holdenh	208375s
T1-Line-03							
T1-Line-04							
T1-Line-05							
T1-Line-06							
T1-Line-07							
T1-Line-08							
T1-Line-09							
T1-Line-10							
T1-Line-11							
T1-Line-12							
T1-Line-13							
T1-Line-14							
T1-Line-15		From: *111111*7404*	External Call	0:00:08	Auto Attendant		System
T1-Line-16							
T1-Line-17							
T1-Line-18							
T1-Line-19							
T1-Line-20	CustomerSupport	From: Anonymous	(610) 364-0724	0:01:20	Connected	williamsj	209481s
T1-Line-21							
T1-Line-22		From: *419669376*7404*	(419) 666-9376	0:00:13	Auto Attendant		System
T1-Line-23	CustomerSupport	From: Practitioner	(732) 603-9523	0:08:00	On Hold	FosterD	209527s
T1-Line-24							

Total Calls 0    Total Time on Calls 00:00:00    Longest Call 00:00:00    Avg Time on calls 00:00:00

Indicates an active call

Indicates an Incoming call



# *Interaction Reports*

**Enter Report Parameters for Queue Period Statistics Daily ...**

Ending Workgroup Name	Start Site ID	End Site ID
Start Date/Time	End Date/Time	Starting Workgroup Name

Ending date and time of report.

#03/12/2002 23:59:59#

Set  
Parameters  
and click  
OK to run



# Running an Interaction Report

Double-click  
On the  
report to run

Interaction Client (WheelerP) IC Server Name bell

Interactions Queues Users Stations Lines Workgroups Reports Configuration Help

Available Reports

Category	Report	Description
Line Group	(Graph) Erlang Study	Report and Graph of Erlang Study for line activity.
Line Group	(Graph) Calls Entered Line Group by Hour	Graph of calls that entered the line group by hour.
Line Group	(Graph) Calls Inbound Entered Line Group by Hour	Graph of calls that inbound entered the line group by hour.
Line Group	(Graph) Calls Outbound Blocked Line Group by Hour	Graph of Outbound Blocked calls on the line group by hour.
Line Group	(Graph) Calls Outbound Line Group by Hour	Graph of calls that entered for outbound in the line group b...
Line Group	(Graph) Percent All Lines Busy by Hour	Graph percentage of time that All of the lines of the group ...
Line Group	(Graph) Percent Line Group Busy by Hour	Graph percentage of time that the lines of the group were b...
Line Group	Line Group Activity Summary by Day	Evaluates call activity on the configured line group across s...
Line Group	Line Group Activity Summary by Line	Evaluates call activity on the configure line group across se...
Line Group	Line Group All Trunks Busy for Interval by Day	Evaluates call activity on the configured line groups where ...
Line Group	Line Group All Trunks Busy for Interval by Grade of...	Evaluates call activity on the configured line groups for a p...
Line Group	Line Group Identification Report	Reports the line group membership and line configuration in...
Line Group	Line Group Least Used Trunks by Day	Report the least used lines for each reporting line group for ...
Queue	(Graph) Abandoned Call Profile	Compares abandoned calls by queue across the time interv...
Queue	(Graph) Profile of Calls Abandoned in 1st Service L...	Graphical profile Calls abandoned in first service profiled in ...
Queue	(Graph) Answered Call Profile	Compares answered calls by queue across the time interval.
Queue	(Graph) Profile of Calls Answered in 1st Service Le...	Calls answered in first service profiled in a graph by interval.
Queue	(Graph) Profile of Average Wait to Answer	Average time calls wait to be answered by an ACD agent.
Queue	(Graph) Profile of Calls Entering ACD	Graphical profile of ACD calls entering queue
Queue	(Graph) Profile of Maximum Wait to Answer	Maximum time calls wait to be answered by an ACD agent.
Queue	Queue Period Statistics Response and Abandon C...	Shows response time (time to answer) and abandoned time...
Queue	Queue Period Statistics Daily Workgroup Summary	Daily Summary of workgroup queue period statistics.
Queue	Queue Period Statistics Workgroup Daily Detail	Daily values for work group queue period statistics.
Queue	Queue Period Statistics Workgroup Service Level ...	Daily Summary grouped by workgroup, day; includes servi...
Queue	Queue Period Statistics Workgroup Service Level ...	Interval detail grouped by workgroup, day, and shift interval...
Queue	Queue Period Statistics Workgroup Service Level ...	Summary grouped by workgroup; includes service level an...

Preview...  
Print...  
Export...

Total Calls 0 Total Time on Calls 00:00:00 Longest Call 00:00:00 Avg Time on calls 00:00:00

Report Help...





# Queue Period Statistics Report



Queue Period Statistics Daily Workgroup Summary										
1 of 2 100% Total: 758 100% 758 of 758										
Preview										
QPeriodDailySu	After Hours	3/8/02	7	:00:00	:00:00	:00:22	7	:00:15	50.0 %	:00:22
W	Summary: After Hours		41	:00:00	:00:00	:00:22	56	:00:13	57.7%	:00:22
	Queue/Skill	Date	ACD Calls Ans	Avg ACD	Avg ACW	Avg Speed Ans	Aban Calls	Avg Aban Time	% Aban	Max Wait
	CustomerSupport	3/4/02	319	:03:24	:00:26	:01:01	23	:01:34	6.7 %	:08:22
	CustomerSupport	3/5/02	251	:03:51	:00:27	:00:28	6	:00:27	2.3 %	:05:00
	CustomerSupport	3/6/02	254	:03:37	:00:28	:00:21	6	:01:09	2.3 %	:04:50
	CustomerSupport	3/7/02	239	:04:01	:00:25	:00:50	9	:01:00	3.6 %	:07:00
	CustomerSupport	3/8/02	233	:03:34	:00:28	:00:22	6	:01:46	2.5 %	:04:20
	Summary: CustomerSupport		1,296	:03:40	:00:27	:00:37	50	:01:18	3.7%	:08:22
	Queue/Skill	Date	ACD Calls Ans	Avg ACD	Avg ACW	Avg Speed Ans	Aban Calls	Avg Aban Time	% Aban	Max Wait
	Email	3/4/02	4	:00:00	:00:00	:00:00	0	:00:00	0.0 %	:00:00
	Email	3/5/02	27	:00:00	:00:00	:00:00	0	:00:00	0.0 %	:00:00
	Email	3/6/02	12	:00:00	:00:00	:00:00	0	:00:00	0.0 %	:00:00
	Email	3/7/02	6	:00:00	:00:00	:00:00	0	:00:00	0.0 %	:00:00
	Email	3/8/02	1	:00:00	:00:00	:00:00	0	:00:00	0.0 %	:00:00
	Summary: Email		50	:00:00	:00:00	:00:00	0	:00:00	0.0%	:00:00
	Queue/Skill	Date	ACD Calls Ans	Avg ACD	Avg ACW	Avg Speed Ans	Aban Calls	Avg Aban Time	% Aban	Max Wait
	Overflow	3/4/02	0	:00:00	:00:00	:00:00	0	:00:00	0.0 %	:00:00
	Overflow	3/5/02	0	:00:00	:00:00	:00:00	0	:00:00	0.0 %	:00:00
	Overflow	3/6/02	0	:00:00	:00:00	:00:00	0	:00:00	0.0 %	:00:00





# Support Dashboard

Click to  
Display  
Support  
incident

Support Dashboard - Peggy Wheeler

Open Support Steps | Open Incidents

----- Response -----

	Date	Time	Action	Initial Status	Incident Name
<input checked="" type="checkbox"/>	2/7/02	4:46:20PM	Follow Up	Follow Up	From: Mark Higby Sent: Wednesday, Febru
<input checked="" type="checkbox"/>	2/7/02	4:48:02PM	Follow Up	Follow Up	From: Mark Higby Sent: Wednesday, Febru
<input checked="" type="checkbox"/>	2/11/02	5:03:38PM	Follow Up	Follow Up	still occasionally receiving receiving e
<input checked="" type="checkbox"/>	2/15/02	12:48:12PM	Follow Up	Follow Up	audrey from the texas state board of n
<input checked="" type="checkbox"/>	3/11/02	1:07:57PM	Follow Up	Follow Up	Patrick Haddad (313) 961-0200 called yes

New Incident | New Letter Incident | Cancel





# eRelationship Support Form



SRA Support Incident - 16684: Patrick Haddad (313) 961-0200 called yesterday and: Follow Up

Service Lvl: 4: Default Support Status: Follow Up Code: 16684

Customer

Anonymous New Customer

Company: [Dropdown]  
Contact: A Anonymous + (000) 0000000  
DBID: [Text] Find  
Source: [Dropdown]  
DCN: [Text]

Address Comm. Component/Issue Recorded By

Type: [Dropdown]  
Name: A Anonymous  
Address: [Text]  
City: [Text]  
State: [Dropdown] Zip: [Text]  
Country: [Dropdown]

Incident Summary

Product: NPDH/HIPDB Owner: Julian Williams  
Category: Data Bank Instructions Team: SRA Support Team  
Subject: Report Supervisor: Peggy Wheeler  
Topic: Policy  
Problem: Patrick Haddad (313) 961-0200 called yesterday and had a question, if a professional society is undertaking professional review action and a physician surrenders his membership while under investigation, is that reportable? [3/8/02 1:06:18 PM williams]  
New: [Text]  
Resolution: [Text]

Open Steps Completed Steps Recording Information Players Publish ☒ Flag For KB ☐

	Response Date	Response Time	Assigned To	Initial Status
<input checked="" type="checkbox"/>	3/11/02	1:07:57PM	Peggy Wheeler	Follow Up
<input type="checkbox"/>				
<input type="checkbox"/>				

History Search New Clone Save Print Cancel Log





# eRelationship Support Form



SRA Support Incident - 14474: From: Debra Hoffman Sent: Tuesday, February 26, 2: Closed

Service Lvl: 4: Default Support Status: Closed Code: 14474

Customer

Anonymous New Customer

Company: [ ]

Contact: A Anonymous + (000) 0000000

DBID: [ ] Find

Source: Email

DCN: [ ]

Address: Comm. Component/Issue Recorded By

Type: [ ]

Name: Debra Hoffman

Address: [ ]

City: [ ]

State: [ ] Zip: [ ]

Country: [ ]

Incident Summary

Product: NPDB/HIPDB Owner: Peggy Wheeler

Category: Policy Questions Team: SRA Support Team

Subject: Report Supervisor: Peggy Wheeler

Topic: Policy

Problem: Thank you for your reply. I understand the purpose of your organization, and am sure it is very important to maintain such a log. What I don't understand is why I am being placed on it. I had a problem paying back a student loan, because of a divorce and I am being placed on such a list! The loan was repaid in 1997....and everything

Resolution: A practitioner who disagrees with a report about him or her contained in the Data Bank may dispute either the factual accuracy of the information in a report or whether a report was submitted in accordance with the

Open Steps Completed Steps Recording Information Players Publish Flag For KB

	Response Date	Response Time	Assigned To	Initial Status
+	3/13/02	5:40:44PM		

History Search New Clone Save Print Cancel Log





# eRelationship Support Form



**SRA Support Incident - 8668: pract requesting correction to license number and : Closed**

Service Lvl. 4: Default Support Status Closed Code 8668

Customer

Anonymous New Customer

Company

Contact A Anonymous + (000) 0000000 DBID Find

Source Letter DCN 5500000024391493

Address Comm. Component/Issue Recorded By

Type

Name Dr. Irani Derakhshan

Address

City

State Zip

Country

Incident Summary

Product NPDB/HIPDB Owner Jeane Wilgus

Category Data Bank Instructions Team SRA Support Team

Subject Self Query Supervisor Peggy Wheeler

Topic Internal Correction

Problem pract requesting correction to license number and state but information was entered as provided on signed and notarized form [1/29/02 11:30:41 PM WheelerP]

Call: Final Status: Closed [1/30/02 2:58:46 PM WilgusJ]

Resolution sent letter explaining that he will have to resubmit self query application with correct information S/oper/custom/pract/derakhshan

Open Steps Completed Steps Recording Information Players Publish Flag For KB

	Response Date	Response Time	Assigned To	Initial Status
+	3/13/02	5:56:00PM		

History Search New Clone Save Print Cancel Log





# Knowledge Base

**Support Step - Add**

Resolution Incident/Assignment At  on  By 2:41:13PM on 3/12/02

Incident  
Support Incident 16974: Entity rec'd a letter in the mail dated 3/2/2002 : Follow Up Re-assign  
Initial Status  Next Actor

Assigned  
By Peggy Wheeler   
To    
On 3/11/02 At 2:41:13PM

Recorded By  
Contact

KB Item Sent  
KB Item

Recorded in eRelationship  
Date

Interaction  
Interaction Call Id   
Date/Time Received

Click to  
Search  
Knowledge  
Base





# *Knowledge Base*

## Select Search

Select how you want to search for a KB item.

Use Incident Parameters

Enter Value

Cancel





# *Knowledge Base*



★ Single Value Entry Form - Add

Enter the search value

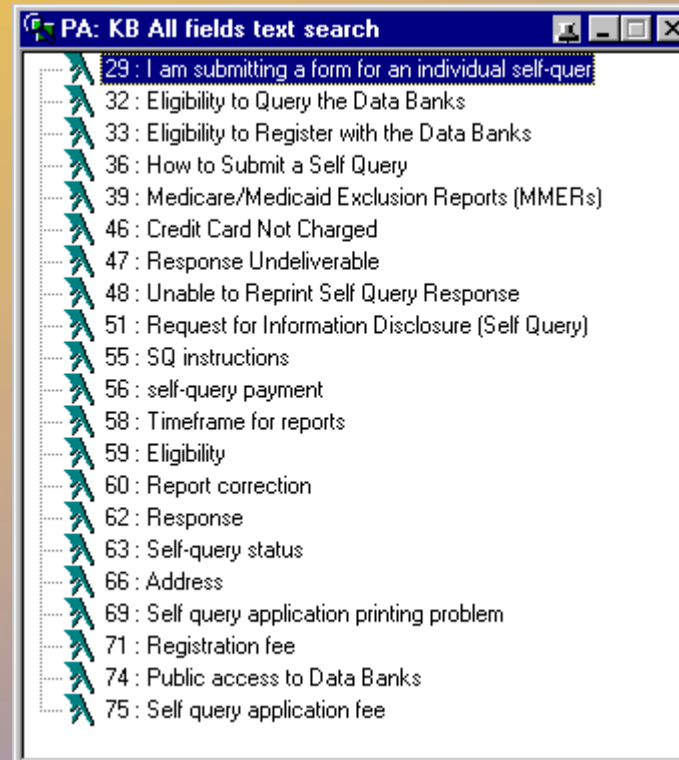
Data Banks

Continue





# *Knowledge Base*





# Knowledge Base

**KB Item - 32 : Eligibility to Query the Data Banks : NPDB/HIPDB**

**Summary**

KB Item # 32 Entered 1/17/02 By Solomon Gebreab  
Publish ☐ Edited ☐ On  By

**Details** | **Related** | **Private Notes**

**Product** NPDB/HIPDB **Subject** Query  
**Category** Policy Questions  
**Topic** Policy  
**Name** Eligibility to Query the Data Banks

**Resolution**  
Thank you for your recent email to the National Practitioner Data Bank (NPDB) and the Healthcare Integrity and Protection Data Bank (HIPDB). We appreciate your patience in awaiting this response.

If you are an entity and wish to query, please note that an entity's eligibility to query and/or report to the NPDB, the HIPDB, or both Data Banks, is based on the entity's function or service as defined by the enabling statutes. Because of the unique requirements and definitions under each statute, an entity may not necessarily qualify as a reporter and/or querier.

**Keywords** eligibility  
**Related Issue**

Save Print Cancel



## *Benefits*

- Faster response to incidents with fewer abandoned calls.
- Enhanced monitoring and recording capability for quality assurance and training refinement.
- Knowledge Base enables consistently accurate and professional responses to customer inquiries.
- Immediate escalation of calls, when needed.
- Trend analysis capability provides improved understanding of user needs.



## *Conclusion*

- The CRM system is meeting the desired objectives.
  - Customer service and support is improved. We are more responsive and accurate in our dealings with customers.
    - Faster response time.
    - Fewer abandoned calls.
    - More accurate and consistent answers to customer questions.
  - We are capturing detailed information regarding all customer interactions and we are using that information to benefit customers.
    - "Practitioner's Guide to the Data Banks" brochure.
    - Improved fact sheets.
    - Development of frequently asked questions (FAQs) for informational web site.



## *Conclusion*

- We have improved management and quality assurance capabilities.
  - Monitor and record voice calls.
  - Track and record all e-mail and letter correspondence performance metrics are achieved and quality is maintained.
  - Ability to record telephone calls for quality review and training.
- Higher quality and consistency in responses through the use of the Knowledge Base.